



# Inventory Best Practices

Perpetual Inventory in Propel Rx allows you to properly monitor inventory within the Propel Rx Drug Folder. The following best practices will assist your pharmacy in keeping inventory accurate.

1

## Spot Check Inventory When Filling Prescriptions

When filling or checking a prescription, look at the On Hand amount on the prescription hardcopy or in the Packaging window against the quantity of drug you physically have on the shelf.

Done daily, this will help maintain accurate inventory levels. If there is a discrepancy, you can modify the inventory on the spot using the [Adjust button in the Drug Folder](#).

2

## Manage Owe Balances

Propel Rx can help manage Owe Balances by auto-reconciling inventory. Follow these steps to ensure your inventory is accurate.

- Review the Auto-Reconcile Owe preference in More (...) > Pharmacy > Workflow. If this preference is OFF, you must manually manage Owe Balances.
- Always fill Owe Balances as soon as inventory is received.

For more information on manually adjusting Owe Balances, see [Reconciling Owe Balances](#).

3

## Set Your Inventory Preferences

Propel Rx Inventory Preferences will help to prevent large amounts of medication from being incorrectly ordered. See [Inventory Preferences](#) for details on how to set these preferences.



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## Download and Reconcile Orders

Integration with PharmaClik Web Services allows you to [download McKesson invoices and reconcile purchase orders from within Propel Rx](#). This helps ensure your inventory is updated and will save time by avoiding the need to do a manual reconciliation. This will also produce the Auto Reconcile Exceptions report.

5

## Use the Auto-Reconcile Exceptions Report

This report prints when an order is auto-reconciled in Propel Rx. It lists:

- Products that could not be auto-reconciled from the invoice file.
- Invoice exceptions and Back-Ordered items.
- Pack Size and DIN substitutions.

For details on how to read and use this report, see [Auto-Reconcile Exceptions Report](#).

6

## Review the Drug Folder History Tab

The [Drug Folder History tab](#) logs any manual adjustments made to the On Hand quantity, other than prescription dispenses. This includes changes made from the Inventory Reconcile Module.

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## Run the Re-Order Analysis Report

The Re-Order Analysis report utilizes your purchase history to determine inventory stock levels. This is useful for existing stores who are new to Perpetual Inventory or stores using Perpetual Inventory who experience stock shortages or overstock.

Use this report to review current and suggested re-order points to ensure appropriate inventory levels. For details on how to run this report, see [Re-order Analysis Report](#).



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## Leverage the Reconcile Module and Inventory Reconciliation History Report

The [Inventory Reconciliation History report](#) is a great tool for performing routine cycle counts of your regular or narcotic/controlled/targeted drugs by generating a list of drugs for physical counting.

The [Reconcile module](#) allows you to update the Actual on Hand values for multiple drugs at once without having to open each individual Drug Folder.

You can use the report or module in isolation but when used together, you can easily and efficiently update Actual on Hand values for the drugs listed on the report.